



Monthly IV&V Report

As of July 2025



Project Health Assessment Rubric



Project Health Status Categorizations			
Project Health Assessment Area	Green	Amber or Yellow	Red
Scope:	<p>All criteria below are being met:</p> <ul style="list-style-type: none"> The scope is well-defined. The scope has not been changed outside of the original scope definition or any scope changes made are not expected to impact the current overall schedule or budget. <p><i>If scope re-baselining has occurred, status may return to this categorization—provided that the above criteria is met for the re-baselined scope.</i></p>	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are one or more areas of scope that have yet to be fully defined, but they are not expected to impact the current overall schedule and/or budget. The scope has not been changed outside of the original scope definition or any scope changes made are expected to have no, or minimal, impact to the current overall schedule or budget, and will not impact the critical path. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of scope that have yet to be fully defined, and these unknowns are expected to impact the current overall schedule and/or budget. The scope has been changed outside of the original scope definition and any such scope changes are expected to impact the current overall schedule or budget and/or critical path.
Schedule:	<p>All criteria below are being met:</p> <ul style="list-style-type: none"> The schedule and critical path are well-defined. The schedule is progressing as planned, with all critical path milestones and deadlines being met. <p><i>If schedule re-baselining has occurred, status may return to this categorization—provided that the above criteria is met for the re-baselined schedule.</i></p>	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of the schedule that have yet to be fully defined, but the critical path is well-defined. The schedule is not progressing as planned but, all critical path milestones and deadlines are currently being met and are expected to continue to be met. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of the critical path schedule that have yet to be fully defined. The schedule is not progressing as planned and critical path milestones and deadlines are not being met and/or are expected to not be met.
Cost:	<p>All criteria below are being met:</p> <ul style="list-style-type: none"> The budget is well-defined. Budget funds have been allocated as needed. The budget is being expended as required. <p><i>If budget re-baselining has occurred, status may return to this categorization—provided that the above criteria is met for the re-baselined budget.</i></p>	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of the budget that have yet to be fully defined, but estimated funds that will be needed are available. Funds needed are exceeding originally budgeted funds and it is impacting the current overall schedule but, not the critical path. The short-term budget is being over-expended but, spending is expected to remain within the overall long-term budget. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are areas of the budget that have yet to be fully defined and estimated funds needed are not expected to be available. Budget funds are not being allocated as needed and this is impacting the critical path. The budget is being over-expended per the original planned budget and spending is expected to exceed the overall budget (including any contingency funds).
Resources:	<p>All criteria below are being met:</p> <ul style="list-style-type: none"> All needed resources have been identified. All identified resources have been allocated. There are no overallocated resources. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are needed resources that have yet to be fully identified, but it is not expected to impact the current overall schedule and/or budget. There are identified resources that have yet to be allocated, but they are not expected to impact the current overall schedule and/or budget. There are resources that are overallocated, but these are not expected to impact the current overall schedule and/or budget. 	<p>One or more of the below circumstances is occurring:</p> <ul style="list-style-type: none"> There are needed resources that have yet to be fully identified and this is impacting, or is expected to impact, the current overall schedule and/or budget. There are identified resources that have yet to be allocated and they are impacting, or are expected to impact, the current overall schedule and/or budget. There are allocated resources that are overallocated and it is impacting, or is expected to impact, the current overall schedule and/or budget.



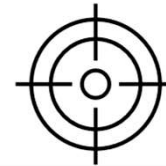
Plante Moran Independent Validation & Verification Approach



- We focus on early detection and correction of errors, enhance management insight into risks, provide observations and recommendations, and ensure compliance with project scope, schedule, and budget requirements. We will assess the health of the project on an ongoing basis, focusing on the artifacts and deliverables being produced by the project team.
- The principles that guide the work we perform include:
 - Complete vendor independence provides integrity to our observations.
 - Transparency in all observations and issues as early as possible.
 - Collaboration with SI, the State project team, and the key stakeholders.
 - Advise on issues and potential opportunities to improve.
 - Being respectful of staff time and project schedule.
- We use the *Project Health Assessment Rubric* (Slide 3) to report levels of risks (using colors) as associated with the areas indicated. Our approach does not necessarily indicate project ultimate success or failure; it is meant to indicate the current risk levels associated with the identified project components with the purpose of advising and reporting on opportunities to improve.



Program Status - July



Target go-live
Phase 1B Oct 25'



Program Status

Scope	<ul style="list-style-type: none">The impact of compliance with the FHWA requirements, by the planned September 8th FHWA visit, is a risk. Requirements include vendor payment tracking to the Federal share, posting transactions to the correct unit/sub-unit combination, fixing depreciation rates on assets, successfully testing complex projects, and posting reimbursements from FHWA to clear accounts receivable.Dependencies on other agencies to complete functional specs (reports, workflow, etc.) and validation of project inputs and outputs (interfaces, reports, etc.) increase the risk to the scope required due to their resource limitations..As the scope of the overall project, including the Phase 2 Transformation Phase and other planned functionality, has not been fully defined, unknowns will impact the overall scope in the future.
Schedule	<ul style="list-style-type: none">The impact of the dependencies on other agencies to complete work on schedule (see scope) will cause missed deadlines and increased complexity to finish all tasks before go-live.The impact of supporting 1A cleanup has hindered the tech team from meeting scheduled tasks.
Budget	<ul style="list-style-type: none">The budget has recently been approved for the next fiscal quarter only. Given the uncertainty of the available budget beyond the next quarter, the risk to the completion of the planned project is substantial.
Quality	<ul style="list-style-type: none">Environment management issues are delaying the ability to utilize non-production environments for testing.Lack of a system architect and the development of a design document will slow down the understanding of the inter-relationships of various systems and files.
Resources	<ul style="list-style-type: none">Significant staff time off during the period leading up to cutover and go-live is impactful.Ongoing, and significant efforts and resources are being spent addressing P1A post go-live support. Work around July 1, new fiscal year requirements for new departments, chart of account fields for NDOT, and updated budget profiles, in addition to the work required for HRM and NDOT go-live October 1, will continue to stress resource allocations.



IV&V Recommendations



- Focus on affirming the integrations, data warehouse, and reports design for build completion and subsequent validation by the data owners. Prioritize when those items are needed at go-live (day 1, day 15, etc.). All resources across the project, including agencies, contractors, and third parties, should be directed to address prioritized tasks for interfaces and reports, and progress should be monitored and reported to ESC.
- One of the main “lessons learned” from the finance implementation (Phase 1A on Jan 1, 24) was the inability to complete end-to-end testing by the dates required, significantly impacting the quality of the business processes after go-live. End-to-end testing should be prioritized by all stakeholders and clearly reported to ESC with focus on the quality of the next Mock conversion (4).
- The status for tasks such as reports, interfaces and validations that are the responsibility of other agencies (SCO, DHRM, and NDOT) should be tracked and reported in Jira (the main project task tracking tool) and communicated regularly to the EC. Increase the cadence of Readiness Assessment meetings.
- The technical and functional resources of other agencies (SCO, DHRM, and NDOT) are being challenged by the work required to complete all project-related tasks. Identify where staff augmentation can be of assistance and prioritize the project work required.



Key RAID items since last report



Each IV&V RAID item has been documented in the accompanying document, Observations and Recommendations Spreadsheet

Risks Open *	0	8	7	6	1	1	3	15	5	10	8	11	6	8
Actions Open	2	1	1	1	0	0	0	12	5	5	5	3	6	4
Issues Open	0	0	1	2	1	1	0	6	5	5	7	9	3	3
Decisions**	2	2	3	9	9	0	7							
Decisions Open**	0	1	1	4	4	0	4							

* Includes Candidates for NV Project

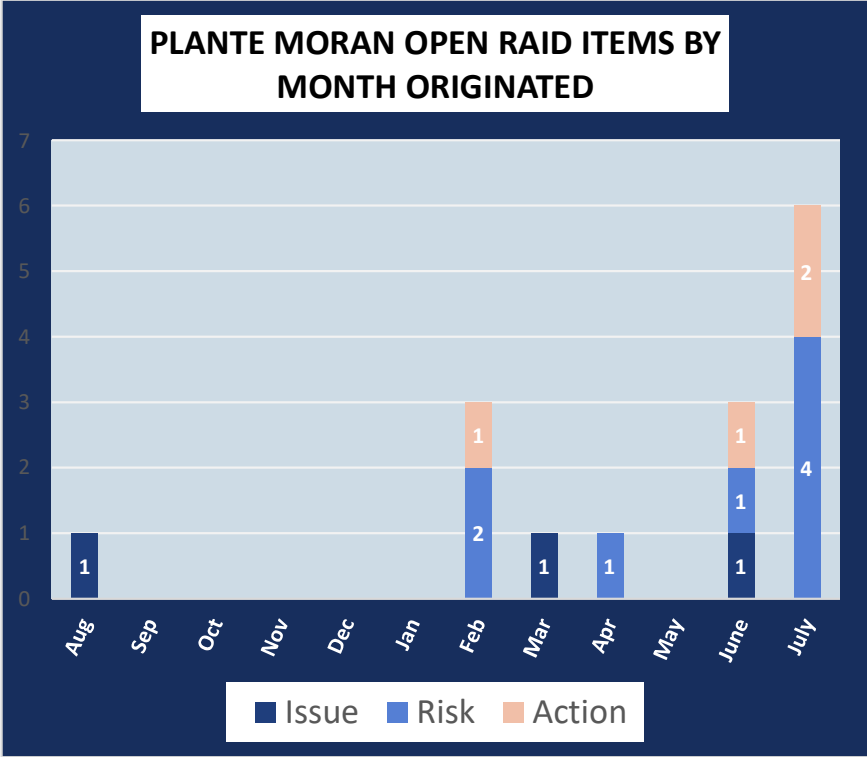
** IV&V Decisions - IV&V not making decisions, but many Action items can be considered Decisions when adjudicated



Plante Moran RAID History



- Since Plante Moran's initial reporting period in July 2024, we have reported 235 RAID items.
- As of the current reporting period, IV&V is reporting 15 open and monitoring RAID items.



Plante Moran Total Risks, Issues, & Actions Reported Since June 2024								
	Certainty	High Probability	Low	Medium	N/A	Probable	Unlikely	Total
Closed	2	50	3	18	107	38	2	220
Monitor		1			5	3		9
Open		2			2	2		6
Total	2	53	3	18	114	43	2	235

Plante Moran Open & Monitor Items by Month First Reported							
	Aug-24	Feb-25	Mar 25	Apr 25	Jun 25	Jul-25	Total
Issue	1	1	1	1	1	2	7
Risk		2		1	1	8	12
Action		1			1	1	3
Total	1	4	1	2	3	11	22

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Risk Action Issues Decisions

PM
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2007: Plante Moran Cares
launches.

2002: Firm is chosen by the U.S.
Department of Treasury to help
investigate the Enron collapse;
Plante Moran Trust is created.

2011: Plante & Moran
drops the "&"; becomes
Plante Moran.

1990: Named for the first time
to Fortune magazine's list of
"100 Best Companies
to Work For."

1996: Plante Moran Cares
& launched.

1996: P&M Corporate
Finance LLC (PMCF)
is founded.

1995: Firm creates domain
and later launches website.

1990: Named "Best
Lodging Company"
by Entrepreneur magazine.



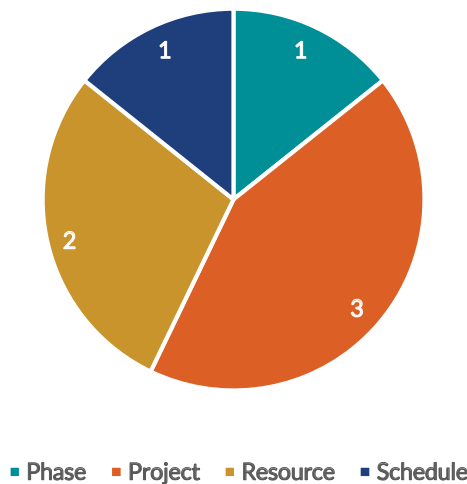


Risk Summary

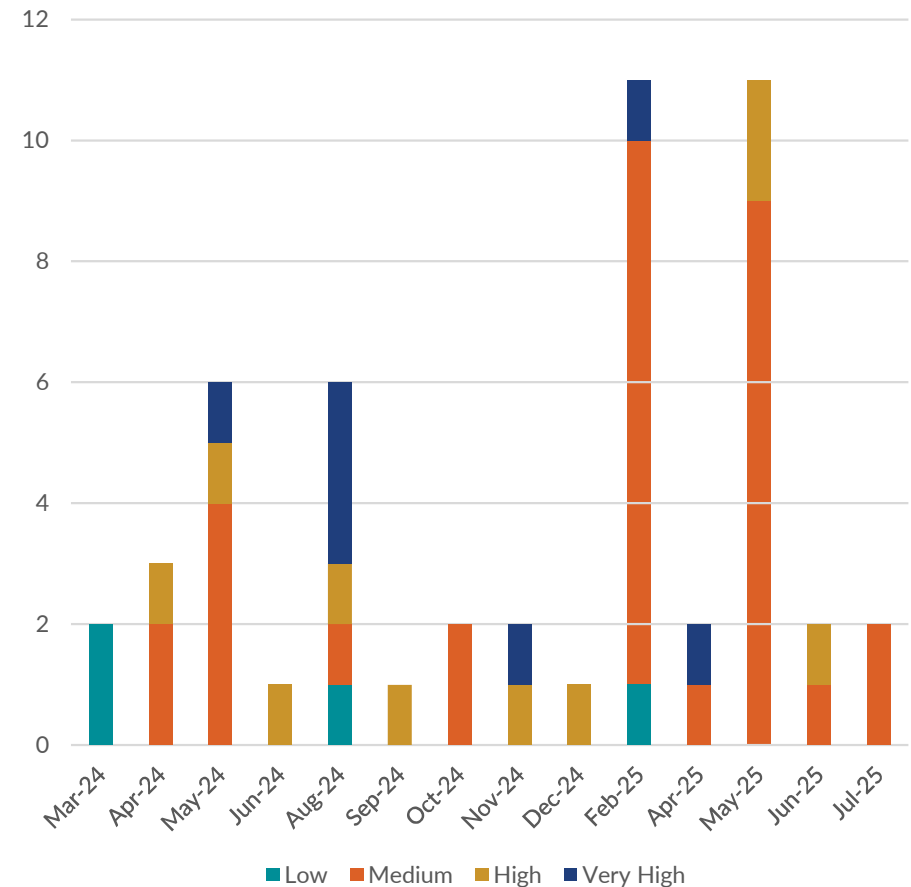


- There are currently 7 Open risks and Candidates on the NV Project Risk Log (OPM) as of the end of the current reporting period.
- IV&V has 8 Risks open, which can be found in the accompanying Observations and Recommendations spreadsheet.

OPM Open Risks by Impact Area



OPM Risks by Severity Assigned by Month



* Candidates* are items being considered by Governance group for risk status.



Actions Summary



- As of the end of the current reporting period, 0 actions remained open (OPM). During the month, 0 Action items were opened, and 0 Action items were closed.
- The Action Log is no longer in use, and this page will be retired next month. The OPM is utilizing Jira as its primary tool for project tasks, along with spreadsheets. Action items as a category will be replaced by other attributes in Jira as it is expected to be reported in the coming months. Accordingly, this page will be retired.
- IV&V has 4 Action Items open in the accompanying Observations and Recommendations spreadsheet.

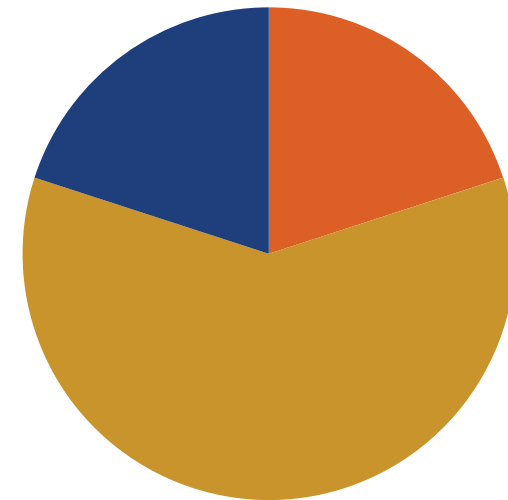


Issue Summary



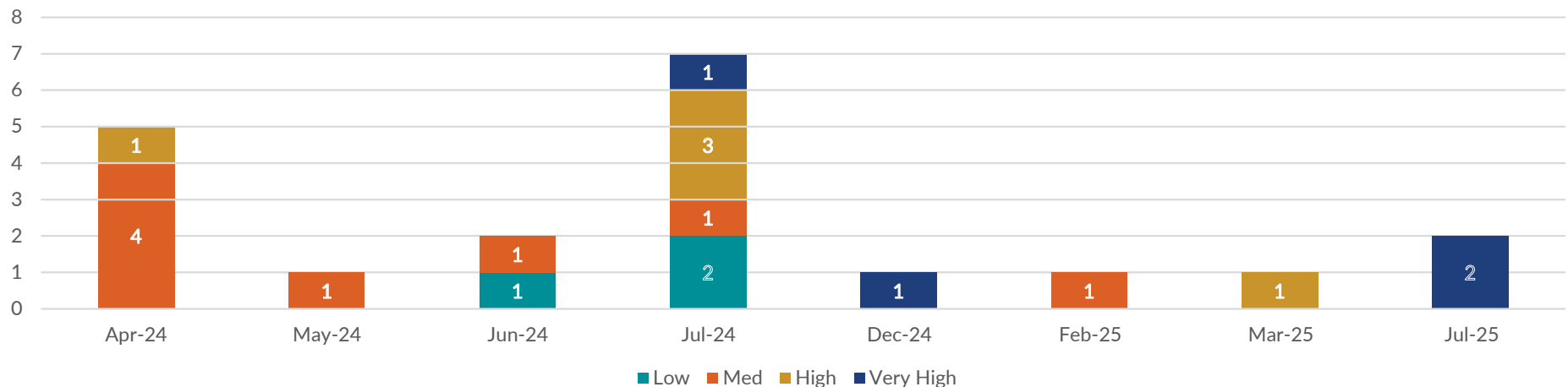
- As of the end of the current reporting period, OPM had 0 open issues. OPM had opened 2 issues in July, but all issues opened since the log's inception are closed (20).
- IV&V has identified 3 open issues which can be found in the accompanying Observations and Recommendations spreadsheet.

OPM Project Issues by Type



■ Phase ■ Process ■ Project ■ Resource ■ Schedule ■ System

OPM Issues Opened by Severity by Month



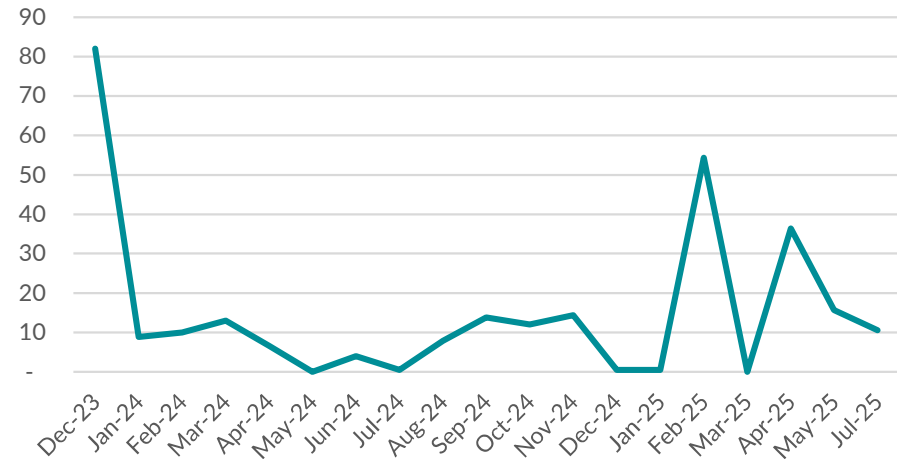


Decisions

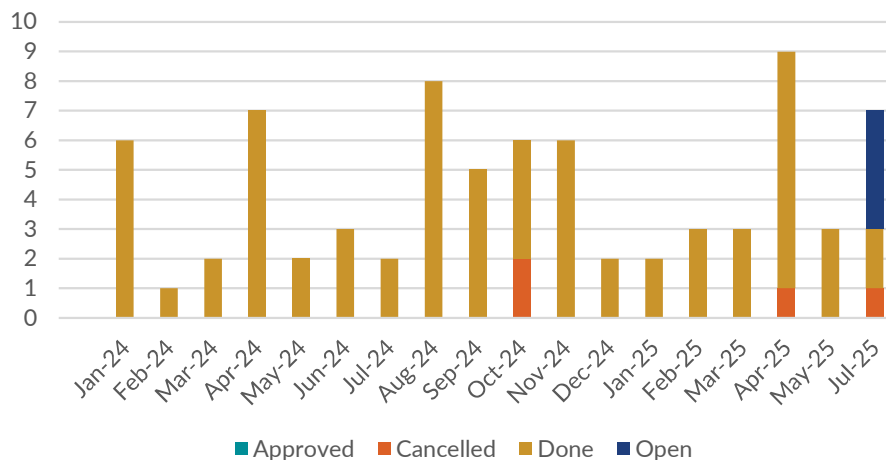
- OPM has logged 77 Decisions to date with 7 added in the current reporting period.
- There were 4 open Decisions at the end of the month.



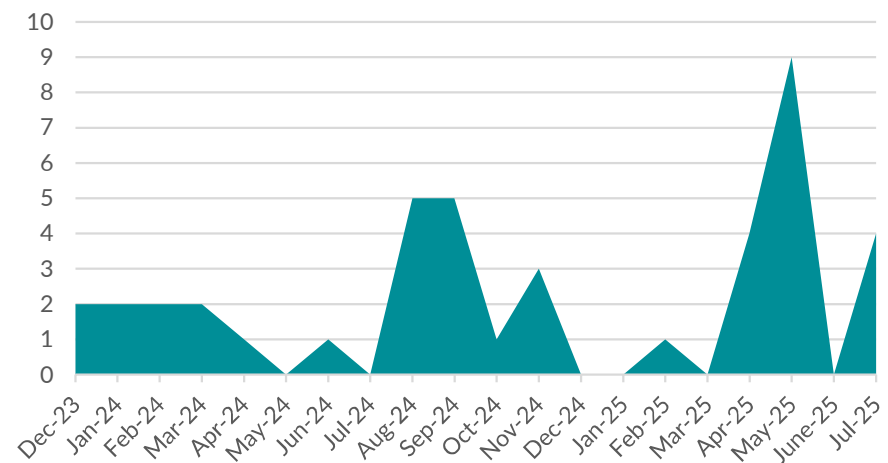
OPM Decisions - Average Days Outstanding



OPM Decisions Look Back



OPM- Open Decisions at EOM



Note: IV&V does not make decisions on the project.

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Bugs Reported

2012: First-Ever Global Workplace Recognition with International Accounting Bulletin's Employer of the Year award.

2011: Plante & Moran drops the "&"; becomes Plante Moran.

2002: Firm is chosen by the U.S. Department of Treasury to help investigate the Enron collapse; Plante Moran Trust is created.

1998: Named for the first time to Fortune magazine's list of "100 Best Companies to Work For."

1996: Plante Moran CRESA is formed.

1992: Plante Moran Financial Advisors registers with the SEC.

1996: P&M Corporate Finance LLC (PMCF) is founded.

1995: Firm creates domain and later launches website.



plante moran

Audit. Tax. Consulting.
Wealth Management.

100 years



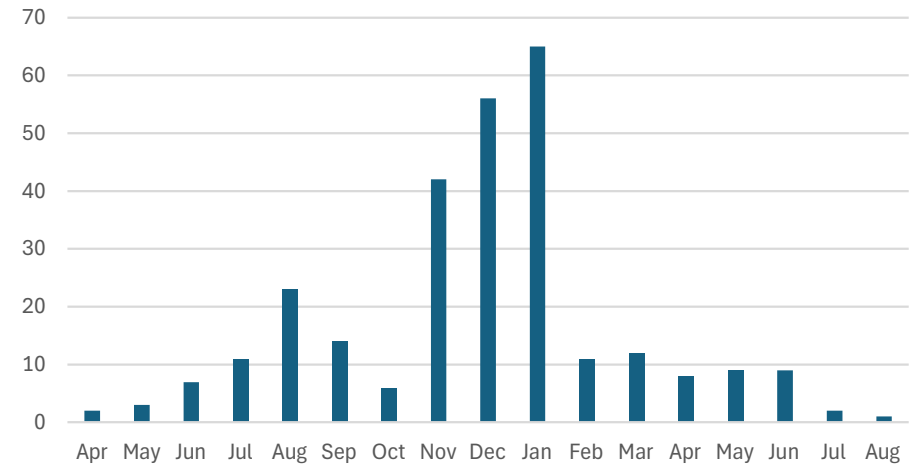
Bugs Reported



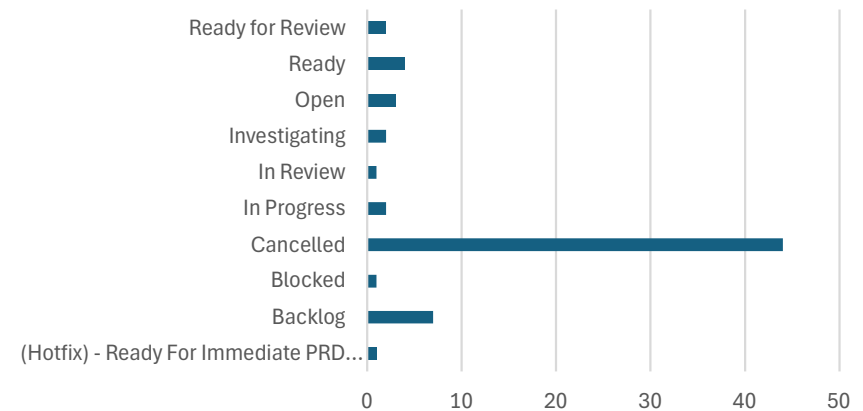
- 272 bugs have been reported in Jira to date.
- 6 new bugs were reported in the current reporting period.
- Of the reported bugs, 17 are in Open, Investigating, In Progress, Testing, Backlog, or related statuses and 11 are in Ready statuses.

**Data is not available for the dates when bug statuses are changed. Plante Moran is only able to track open dates and provide a snapshot of statuses as they existed in early July.*
***One bug entered on 1/1 was identified as a Test Bug with no information included, so this was removed from the totals presented here.*

OPM Bugs Reported by Month



OPM Status of Reported Bugs Not Done/Cancelled





Contracts and Budgets Deliverables

2012: First-Ever Global Workplace Recognition with International Accounting Bulletin's Employer of the Year award.

2011: Plante & Moran drops the "&"; becomes Plante Moran.

2002: Firm is chosen by the U.S. Department of Treasury to help investigate the Enron collapse; Plante Moran Trust is created.

2003: Firm forms Diversity Council.

2003: First international office in Shanghai, China.

1998: Named for the first time in Fortune magazine's list of "100 Best Companies to Work For."

1996: Plante Moran CHS & Lewis.

1993: Plante Moran Financial Advisors registers with the SEC.

1996: P&M Corporate Finance LLC (PMCF) is founded.

1995: Firm creates domain and later launches website.

1992: Henderson Trust established; 1993 Henderson Trust established in 1993.





Assessment of Contract Documents



CGI Technologies

» Contract Highlights

- ❑ Covers Financial and Human Resource systems SaaS, including:
 - ❑ Phase 1A MVP FIN
 - ❑ Phase 1B MVP HRM including Payroll
 - ❑ Phase 2A FIN Business Transformation
 - ❑ Phase 2B HRM Business Transformation
- ❑ Supporting current CGI Advantage 2 environment

» Contract

- ❑ Initial contract executed Sep '23
- ❑ Value \$90,225,000*
- ❑ Contracted term through Sep '28

» Contract Amendments

- ❑ CR022 reallocated funds to FY25 to support phase 2 planning activities.
- ❑ CR023 shifted \$1M from future software support to strengthen ongoing implementation services.
- ❑ CR024 added the PI7 Completion Report to expand existing reporting coverage.

» Risks

- ❑ Contracted dates for Phase 2 July be extended and the ability to complete Phase 1B and Phase 2 within the budget is a risk.

*



Assessment of Contract Documents



BerryDunn

» Contract Highlights

- ❑ Overall project management support
- ❑ BerryDunn will lead and coordinate all State project activities
- ❑ Program Managers for FIN and HRM; not Technical

» Contract

- ❑ Initial contract executed Feb '24.
- ❑ Current NTE \$4,811,366
- ❑ Contract term
 - ❑ Extended to Sept 2025

» Contract Amendments

- ❑ CR001 moved the delivery date of the Phase 1A Legacy System Impact Analysis from December 2024 to August 2025. There is no cost difference from this CR.

» Risks

- ❑ Project continuity risk. The period extended does not cover HRM post go-live or Phase 2 go-live.

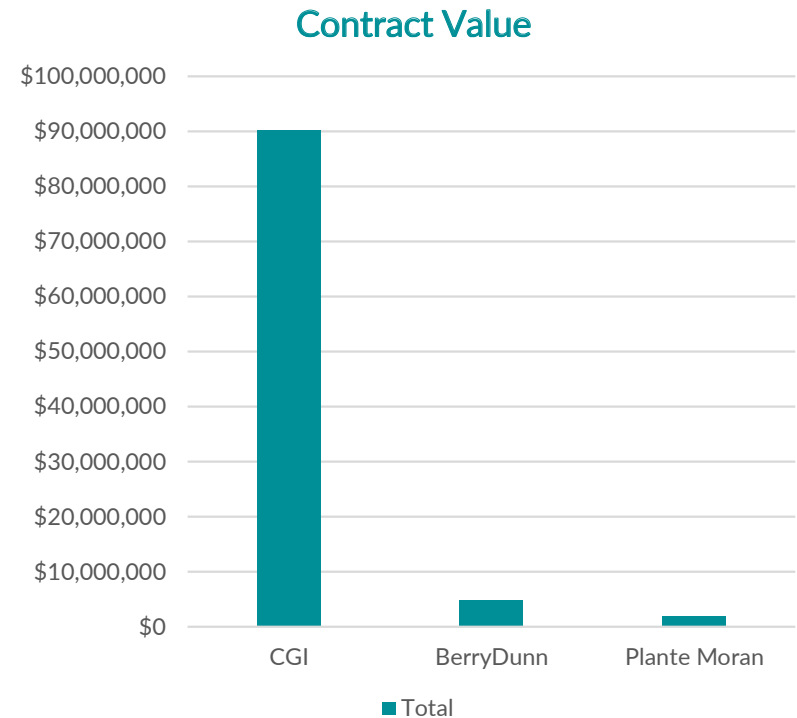


Change Requests

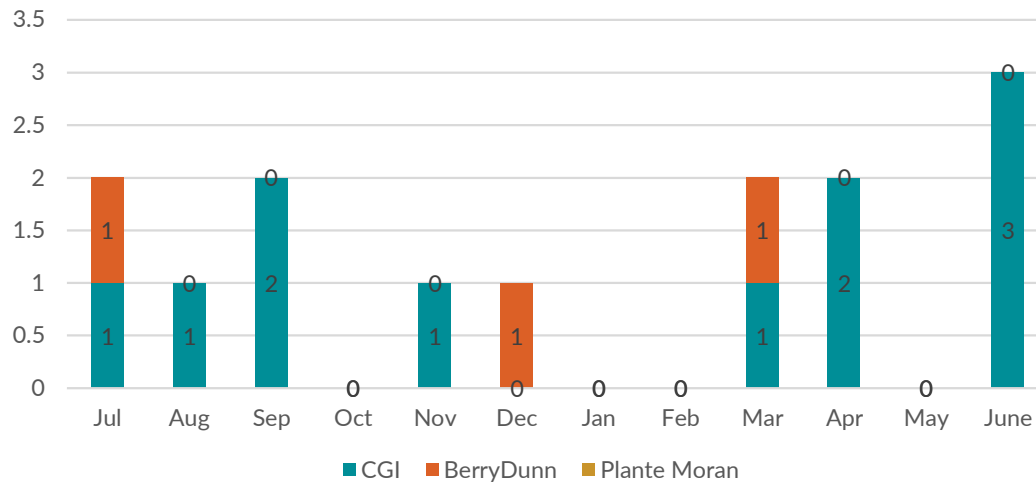


* Change Requests and changes to scope – include core decision papers and process changes

July 28, 2025				
	CGI ¹	BerryDunn	Plante Moran	Total
Contract	\$90,225,000	\$771,896	\$1,833,000	\$92,829,896
CR/Amend		\$4,039,470		\$4,039,470
Total	\$90,225,000	\$4,811,366	\$1,833,000	\$96,869,366



Project Change Requests or Amendments



¹ Note: The total contract amount has not changed, but the timing of the consumption of the Change Control component of the budget to fund the contract has changed



CGI Budget FY 25 Lookback



Excluding Software

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	TOTAL
Planned	\$ 2,417,740	\$ 225,000	\$ 1,725,000	\$ 3,400,000	\$ 725,000	\$ 4,100,000	\$ 1,975,000	\$ 2,375,000	\$ 1,225,000	\$ 950,000	\$ 500,000	\$ 2,400,000	\$ 22,017,740
Earned	\$ 200,000	\$ 1,480,645	\$ 1,205,645	\$ 780,645	\$ 2,780,645	\$ 2,330,645	\$ 1,630,645	\$ 705,645	\$ 1,955,645	\$ 630,645	\$ 1,030,645	\$ 6,131,075	\$ 20,862,525
Actual	\$ 200,000	\$ 1,480,645	\$ 1,205,645	\$ 580,645	\$ 2,980,645	\$ 1,030,645	\$ 2,930,645	\$ -	\$ 2,661,290	\$ 630,645	\$ -	\$ 5,700,430	\$ 19,401,235

Including Software

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	TOTAL
Planned	\$ 2,794,031	\$ 225,000	\$ 1,725,000	\$ 8,785,000	\$ 725,000	\$ 4,100,000	\$ 1,975,000	\$ 2,375,000	\$ 1,225,000	\$ 950,000	\$ 500,000	\$ 2,400,000	\$ 27,779,031
Earned	\$ 200,000	\$ 1,480,645	\$ 1,205,645	\$ 6,165,645	\$ 2,780,645	\$ 2,330,645	\$ 1,630,645	\$ 705,645	\$ 1,955,645	\$ 630,645	\$ 1,402,710	\$ 6,135,301	\$ 26,623,816
Actual	\$ 200,000	\$ 1,480,645	\$ 1,205,645	\$ 5,965,645	\$ 2,980,645	\$ 1,030,645	\$ 2,930,645		\$ 2,661,290	\$ 630,645	\$ 372,065	\$ 5,704,656	\$ 25,162,526

Page summarizes reported activity for FY 25'

- Planned = Budget for reported month
- Earned = Delivery accepted during reported month
- Actual = Invoiced Date during reported month

¹The OPM deliverables trackers may not have been not fully updated by the time the data was generated for this report. Plante Moran has made certain updates based on known, current information, which may also recast prior months' reported data.



CGI Planned, Earned, & Actual for FY 26 & Prior



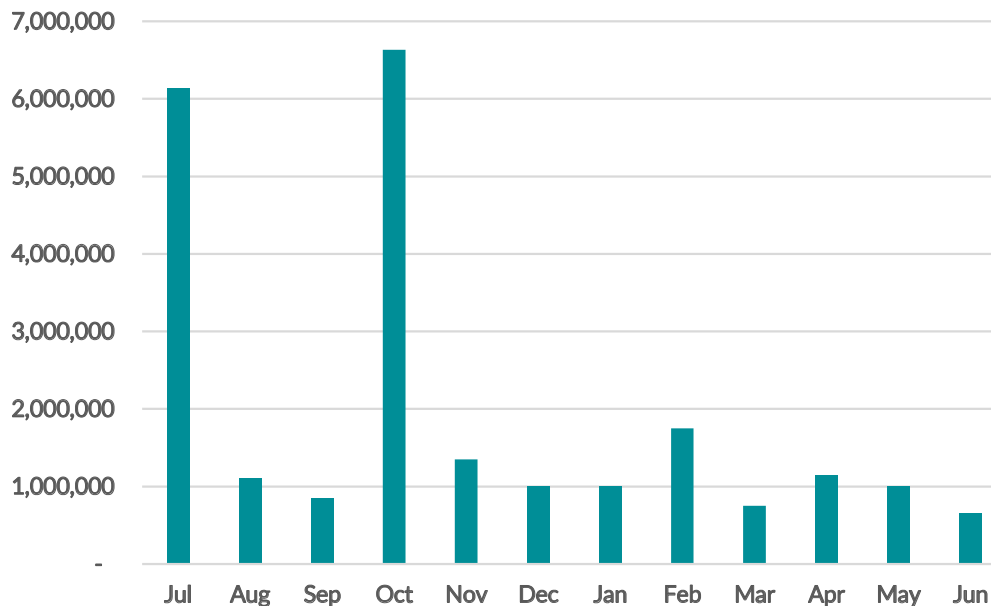
Excluding Software

	July	Prior FY25	Prior FY 24	Project Total
Planned	\$6,133,058	\$22,017,740	\$ 11,850,000	\$40,000,798
Earned	\$ 80,645	\$22,330,590	\$ 11,850,000	\$34,261,235
Actual	\$2,120,000	\$22,184,816	\$ 11,850,000	\$36,154,816

Including Software

	July	Prior FY25	Prior FY 24	Project Total
Planned	\$6,133,058	\$27,779,031	\$ 17,407,580	\$51,319,669
Earned	\$ 80,645	\$26,623,816	\$ 17,407,580	\$44,112,041
Actual	\$2,120,000	\$25,162,526	\$ 17,407,580	\$44,690,106

Fiscal Year 26'
Budget by Month (including software)



July Budget includes:

- \$2.1M for Local Support Services over 12 months
- \$1.5M for NeoGov

October Budget includes:

- \$5.4 Advantage SaaS Fees

- Planned = Budget for reported month
- Earned = Delivery accepted during reported month
- Actual = Invoiced Date during reported month

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BerryDunn & Plante Moran Planned, Earned, & Actual FY 26¹



BerryDunn

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Planned	\$269,298	\$269,298	\$269,298	\$276,574	\$276,574	\$276,574	\$276,574	\$276,574	\$276,574	\$276,574	\$276,574	\$276,574	\$3,297,060
Earned	\$289,075	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$289,075
Actual	\$289,075	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$289,075

- BerryDunn contract
- Amendment 1 revised on 5/30/24 increased contract to \$2,552,081 through July 25
- Amendment 2 signed on 7/3/24 added a Program Manager (IT) Role to the contract NTE \$2,552,081
- Amendment 3 signed on 12/11/24 extended the contract through September 2025 and increased the NTE to \$4,811,366

Plante Moran

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Planned	\$58,000	\$58,000	\$58,000	\$58,000	\$58,000	\$58,000	\$58,000	\$58,000	\$58,000	\$58,000	\$58,000	\$58,000	\$696,000
Earned	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Actual	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

- Planned = Budget for reported month
- Earned = Delivery accepted during reported month
- Actual = Invoiced Date during reported month

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Combined 3 Partners Planned, Earned, & Actual for FY 26



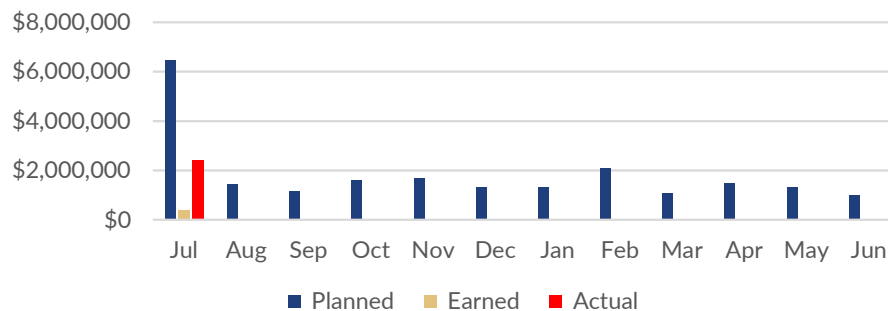
Excluding Software

	FY 26 Jul	FY 26 Aug	FY 26 Sep	FY 26 Oct	FY 26 Nov	FY 26 Dec	FY 26 Jan	FY 26 Feb	FY 26 Mar	FY 26 Apr	FY 26 May	FY 26 Jun	FY 26 TOTAL
Planned	\$6,460,356	\$1,427,298	\$1,177,298	\$1,584,574	\$1,684,574	\$1,334,574	\$1,334,574	\$2,084,574	\$1,084,574	\$1,484,574	\$1,334,574	\$984,574	\$21,976,118
Earned	\$369,720	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$369,720
Actual	\$2,409,075	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,409,075

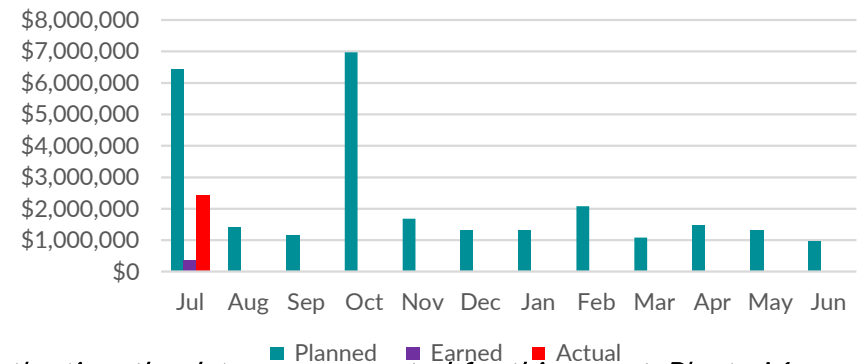
Including Software

	FY 26 Jul	FY 26 Aug	FY 26 Sep	FY 26 Oct	FY 26 Nov	FY 26 Dec	FY 26 Jan	FY 26 Feb	FY 26 Mar	FY 26 Apr	FY 26 May	FY 26 Jun	FY 26 TOTAL
Planned	\$6,460,356	\$1,427,298	\$1,177,298	\$6,969,574	\$1,684,574	\$1,334,574	\$1,334,574	\$2,084,574	\$1,084,574	\$1,484,574	\$1,334,574	\$984,574	\$27,361,118
Earned	\$369,720	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$369,720
Actual	\$2,409,075	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,409,075

Combined Earned Value by Month Excluding Software



Combined Earned Value by Month Including Software



¹The OPM deliverables trackers may not have been not fully updated by the time the data was generated for this report. Plante Moran has made certain updates based on known, current information, which may also recast prior months' reported data.

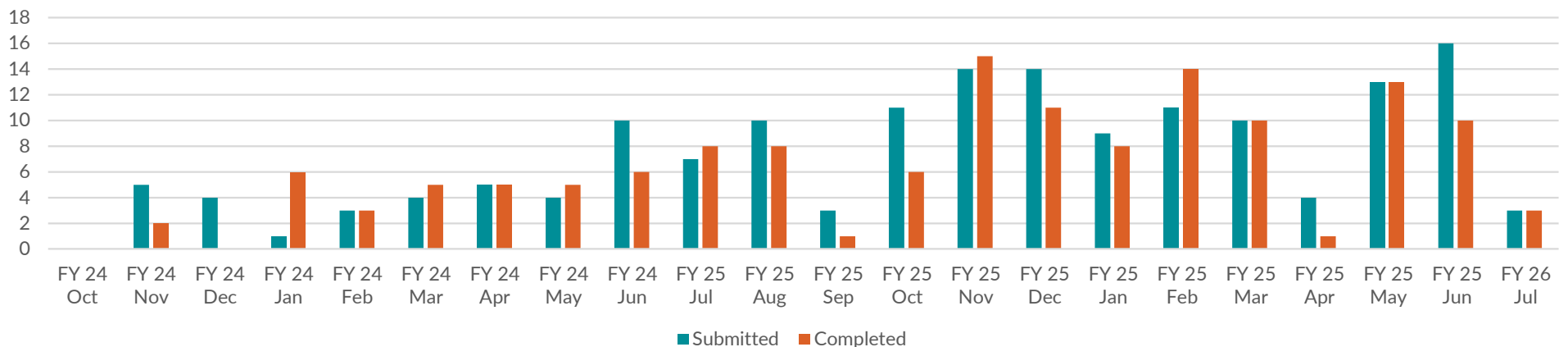


Deliverables



		FY 24 Oct	FY 24 Nov	FY 24 Dec	FY 24 Jan	FY 24 Feb	FY 24 Mar	FY 24 Apr	FY 24 May	FY 24 Jun	FY 25 Jul	FY 25 Aug	FY 25 Sep	FY 25 Oct	FY 25 Nov	FY 25 Dec	FY 25 Jan	FY 25 Feb	FY 25 Mar	FY 25 Apr	FY 25 May	FY 25 Jun	FY 26 Jul	FY 26 Total	FY 25 Total	FY 24 Total	Total
CGI	Submitted		5	4	1	3	3	4	3	7	1	5	1	4	5	7	3	5	5	1	6	11	1	1	54	30	85
CGI	Completed		2		6	3	4	4	4	5	0	3	0	0	5	4	6	4	5	1	6	6	1	1	40	28	69
BerryDunn	Submitted						1	1	1	1	1	1	2	2	2	3	2	2	2	0	3	3	1	1	23	4	28
BerryDunn	Completed						1	1	1	1	1	1	1	2	2	3	2	2	2	0	3	3	1	1	22	4	27
Plante Moran	Submitted									2	5	4	0	5	7	4	4	4	3	3	4	2	1	1	45	2	48
Plante Moran	Completed										7	4	0	4	8	4	0	8	3	0	4	1	1	1	43	0	44
Total	Submitted	0	5	4	1	3	4	5	4	10	7	10	3	11	14	14	9	11	10	4	13	16	3	3	122	36	161
Total	Completed	0	2	0	6	3	5	5	5	6	8	8	1	6	15	11	8	14	10	1	13	10	3	3	105	32	140

Monthly Deliverable Activity





Observations and Recommendations



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The Observations and Recommendations below address items Plante Moran has identified in Slide 4, Program Status. Additional support can be found in the associated document, *Plante Moran Report Out Core NV July 2025 Report Attachment Observations and Recommendations*



Scope



#	Observation	Recommendation (as updated)	OPM Response	OPM Status	PM Status	Probability	Severity
196	<ul style="list-style-type: none"> The strategy for the HR data warehouse is unknown. OPM needs to determine if the HRDW will exist in its current form with a bridge interface created, or will be retired in favor on new ADV4 reports developed in its place. The Data warehouse team velocity did not significantly improve over the prior reporting period. A portion of of the team's resources (effort) was reallocated for post-production support issues, thus impeding progress. As of this reporting period (includes NDOT DW and HRM) the Jira work is as follows: <ul style="list-style-type: none"> Backlog - 17 Assigned - 2 In progress - 20 Blocked - 5 Code review - 40 Testing - 17 Plante Moran will continue to monitor this item as the team enters the final PI for October 2025 go-live. 	<ul style="list-style-type: none"> This is a critical decision to be made by OPM that will impact the scope of work required for Phase 1B. The advantages and disadvantages of using a bridge (temporary) interface should be carefully considered. This approach will require that ADV4 data be retroactive back converted for ADV2 format, which is not a recommended long term strategy from Plante Moran. 	<ul style="list-style-type: none"> The Pie Chart query has been updated to include both HRDW & FDOTDW and removed cancelled tickets. At this time we have 6 (contracted) developers who review code collaboratively and confirm readiness for release. The numbers in each category change daily when subtasks are added to get assistance - so looking at % or the epic level is a better metric. Ill see if I can get a report in the Dashboard that tracks % complete / status by Epic and it will provide a more accurate picture. 		Action - Monitor	N/A	N/A



Schedule



#	Observation	Recommendation	OPM Response	OPM Status	PM Status	Probability	Severity
259	<ul style="list-style-type: none"> NDOT and SCO resources are tasked with developing certain required reports, developing scripts, testing scripts, developing interfaces, etc. Their activities are not included in the primary project task tracking system (Jira), which does not provide a clear, unified picture to stakeholders of progress, backlogs, and risks for all activities regardless of owner/assignee. 	<ul style="list-style-type: none"> Visibility into agency activities and impact on the project team resources, both Functional and Tech should be clear to all stakeholders from a single point of tracking. Incorporate the resources and tasks into Jira to measure, monitor, and report progress to the stakeholders. 	<ul style="list-style-type: none"> NDOT report tech is tracking the list and status of needed reports in a SharePoint workbook shared with OPM tech PMs and reports team, as well as IV&V. OPM's responsibility is to support NDOT's effort but does not own 		Risk - Open	High Probability	Critical
246	<ul style="list-style-type: none"> OPM Technical team has been impeded in the development of required HRM reports for Phase 1B by the unavailability of the required non-production (MA1) environment, due to its use for mock conversation activities. 	<ul style="list-style-type: none"> OPM and CGI should identify a non-production environment that is consistently available and with adequate data to support the development of the HRM reports for Phase 1B. This issue will increase in severity as the MA1 environment will be used for Mock 3, thus requiring a two week window of downtime for the OPM Tech reporting team. 	<ul style="list-style-type: none"> This is accurate. The reports team worked on NDOT support, PROD incident resolution, and HRM analysis during the time it was blocked from active development for HRM. 		Issue - Monitor	N/A	Critical



Budget – The budget has recently been approved for the current fiscal quarter only. Given the uncertainty of the available budget beyond the next quarter, the risk to the completion of the planned project is significant.

#	Observation	Recommendation	OPM Response	OPM Status	PM Status	Probability	Severity



#	Observation	Recommendation	OPM Response	OPM Status	PM Status	Probability	Severity
264	<ul style="list-style-type: none"> NDOT has not provided a comprehensive training plan as they are charged with training stakeholders. This can result in significant disruptions to NDOT operations and OPM support. 	<ul style="list-style-type: none"> NDOT should at provide a comprehensive training plan to the OPM Training team to leverage the OPM team's experience with the training logistics as well as the coordination of posting the associated materials for each session. 	<ul style="list-style-type: none"> Several strategic planning sessions were conducted jointly with NDOT, including sessions with NDOT representatives, to develop a training strategy that aligns with NDOT's direction, and optimizes the available resources and NDOT team members. Per NDOT's request, key Leads were identified to attend Instructor-Led Training (ILT) sessions, with the expectation to cascade this knowledge within their respective teams. This approach, and the expectation for internal knowledge sharing, is explicitly included in the Training plan approved by NDOT (David Wooldridge). It is important to clarify that there was no mutual expectation for NDOT to provide their internal training strategy back to OPM. NDOT specifically requested to manage the execution of their internal training independently, and this is reflected in the jointly defined scope of the training plan. 		Risk – Open	Probable	High



#	Observation	Recommendation	OPM Response	OPM Status	PM Status	Probability	Severity
197	<ul style="list-style-type: none"> Plante Moran has not been provided a formal draft of the system architecture diagram for review. Based on the response provided from OPM and a review of "work in progress" documents, such diagram creation is in process. Plante Moran will continue to monitor this item until completed. 	<ul style="list-style-type: none"> Plante Moran has not been provided a formal draft of the system architecture diagram for review. There is also a vacancy in the Technical Architect position for OPM, this individual was responsible for leading the creation of the referenced diagram. 	<ul style="list-style-type: none"> OPM Tech reviewed the current draft system architecture diagram and has provided a pdf. The key resources involved in developing the diagram and supporting documentation are still on project; the released contractor's input was minimal. 		Issue - Monitor	N/A	High
218	<ul style="list-style-type: none"> Performance issues with the HRDW may exist when executing complex or long running reports. The HRDW team is actively working to optimize queries for reports to reduce their runtime and impact on the HRDW computing infrastructure, however this issue is not fully mitigated. 	<ul style="list-style-type: none"> OPM tech should continue to review and optimize database queries wherever possible. It is recommended that HRDW performance testing be completed to identify and resolve any performance-related issues prior to Phase 1B go-live. 	<ul style="list-style-type: none"> SCO reports that they have requested the IFC for contract support on financial reporting. This request has been approved and resources have been secured. 		Issue - Monitor	N/A	Significant



Resources



#	The project team has limited resources, tools, infrastructure, policies & procedures, and experience managing stabilization.	Recommendation	OPM Response	OPM Status	PM Status	Probability	Severity
266	<ul style="list-style-type: none"> The OPM technical team has a significant amount of interface-related work required for Phase 1B and 1C (October 2025). The Jira data indicates a work queue for OPM Tech of 165 story points associated with interface work, including 85 of these story points in the backlog (not started) status. Given the historical velocity of the team combined with personnel changes, there is a risk of interface development not being completed by the required deadline, delaying the go-live date or significantly impacting the quality of the system at go-live. 	<ul style="list-style-type: none"> OPM Tech should continue to review interface staffing resource levels and capabilities, making adjustments where necessary to meet the required workload. Additionally, improvements should be made to the collaboration with functional teams (FIN, HR, NDOT) to ensure timely conveyance of information and requirements to the OPM Tech development teams to avoid unnecessary delays in the interface development process and subsequent end-to-end testing. 	<ul style="list-style-type: none"> The technical team agrees with the observation. The replacement FTE developer started on 8/5 and the additional contract developer starts on 8/13. Our collaboration with the functional HRM and technical NDOT FIN team has been and continues to be outstanding. The slow progress in on project interface work in July was due to year end close requiring the majority of HRM stakeholders focus. We are comfortable with where we stand in our ability to complete the work scheduled for PI8. 		Risk – Open	High	Critical



Appendices



Legend for Observations & Recommendations



RISK PROBABILITY		
Label	Abbreviation	Description
Certainty	C	Risk will occur
High Probability	H	Risk is very likely to occur
Probable	P	Probable
Unlikely	U	Risk not expected to Occur
Remote	R	Risk extremely unlikely to occur

RISK/ISSUE SEVERITY		
Critical	C	Critical/Devastating impact to the project that requires immediate attention and action
Significant	S	Critical/Devastating impact to the project that requires immediate attention and action
High	H	Considerable impact to project that needs prioritized attention
Medium	M	Moderate impact on project but without high priority
Low	L	Minimal impact on project that July be acceptable without extensive mitigation efforts



RAID Approach



RAID LOG DEFINITIONS	
Risk Log	Risks are events that July occur over the course of the project that could have adverse or detrimental effect on overall success
Action Log	Actions are the things that need to be done throughout the duration of the project and should be communicated to stakeholders
Issue Log	An issue is an unexpected event happening in the present moment with a potential negative impact on reaching goals
Decision Log	Decisions that need to be made over the course of the project should be communicated with stakeholders and memorized

Priority Ranking	
L = Low	Item is less important at this time
M = Medium	Item is usually necessary but are not the most important item at present
H = High	Items is critical to address currently

Severity Ranking	
L = Low	Item will not materially affect the usability of the system
M = Medium	Item July impact some portion of the usability of the system but not the overall ability to go live
H = High	Item July impact the ability to go live if not mitigated



Thank you



2003: Firm forms Diversity Council.

2003: First international office in Shanghai, China.

2002: Firm is chosen by the U.S. Department of Treasury to help investigate the Enron collapse; Plante Moran Trust is created.



2011: Plante & Moran drops the "&"; becomes Plante Moran.

2012: First-Ever Global Workplace Recognition with International Accounting Bulletin's Employer of the Year award.